

Marketing to the Public Accounting Profession – 101

A Special Day of Consulting for your entire team!

Whether your company is large or small, with a single offering or multiple products, well-established or just entering the marketplace, you can benefit from Greg's extensive background. As both an industry and professional thought-leader, he can help you refine product features, establish target market segments, and, most importantly, enhance your understanding of demographics of the accounting profession and "the mind of the practicing accountant." He regularly speaks to (and with) thousands of practitioners and consults with dozens of vendors serving the profession. No one else offers this deep, rich and complete background. Greg is available for strategic planning/products review upon request – learn what your customers want, what they need (not always the same thing!), and what your competitors know and don't want you to find out!

Travel expenses and a daily consulting fee apply.

A note from Greg...

- ♦ I accept only a limited number of vendors as consulting clients.
- ♦ I travel and speak extensively, and **my calendar fills very quickly.**
- ♦ My consultations are done on-site and only in a full (or multi-) day format.
- ♦ Full days generally include a dinner meeting the day I arrive and a complete "long-day" session with ending times based on my return flight schedule.
- ♦ I implement a mutual NDA with each and every client.
- ♦ My consultations do not include written reports.
- ♦ I offer a "no questions" guarantee -- if our time together was not as valuable as you had expected simply so note on my invoice and pay only my expenses.
- ♦ My daily rate is industry average.
- ♦ I do not bill for follow-up telephone calls or emails.
- ♦ I spend your travel dollars as though they were my own and always try to group trips so as to minimize costs for everyone.



Gregory L. LaFollette, CPA.CITP

Practitioner, Executive, Journalist, Family Man...Consultant

I have adopted a unique approach to the service of my profession. The first is as a consultant to public accounting firms and to vendors seeking to serve those firms; the second is as Executive Editor of *The Tech Gap* — the country's first blog specifically created for the tax and accounting profession and for vendors who seek to serve that community; and the third, just to ensure I stay completely current with the trials and tribulations of the practicing accountant, is as Senior Manager of Tax and Technology Consulting with the Top 25 firm of Eide Bailly, LLP.

I was the Executive Editor of *The CPA Technology Advisor*, the country's leading publication dedicated to the application of technology to public accounting until I left that post in 2009 to slow down my life and better control my travel schedule. Formerly I was VP at Thomson Reuters Creative Solutions and Tax & Technology partner at LaFollette, Jansa, Brandt & Co., LLP. I served on the AICPA CITP Credential Committee (Chair), the National Accreditation Commission (ad hoc via the Credential CITP Committee), the Top Technologies Task Force, and the TECH+ Planning Committee. I am a current member of the Technology Advisory Board of the *Journal of Accountancy*.

I completed my professional training at Augustana College. I am a CPA and a CITP and also a member of the AICPA Information Technology Division. I am a national speaker for CPA societies, industry groups, and computer user groups and have published hundreds of articles on financial services and computer systems management. I host dozens on web-casts every year and record a series of regularly scheduled, recurring podcasts.

My wife, Kaye, and I have one grown daughter and have chosen to live in our hometown of Sioux Falls, South Dakota.

"In launching a new technology startup in the accounting market, Greg's advice was invaluable. Greg was a huge help in helping us understand the accounting software market and craft our go-to-market strategy. Beyond that, Greg's professionalism and business ethic is as good as it gets. Thanks again for all of your help!"

— ERIC PULASKI, **FOUNDER & CEO OF SMARTVAULT CORPORATION**

"Greg LaFollette has given Copanion a solid understanding of the accounting profession and how vendors can succeed in serving its members. With his help, our GruntWorx products have been recognized as the leading tax document automation products. Could we have done this on our own by trial and error? Maybe, but having Greg as a coach accelerated our success by at least a year."

— STEVEN LADD, **FOUNDER & CEO OF COPANION**

"I am one of your biggest fans. My feeling is that the world makes a lot of jokes about consultants coming in and looking at your watch and just telling you what time it is without adding a lot of value. You add real and enduring value. I genuinely believe that you behave much more as a business partner than a consultant. We would recommend you to anyone without reservation."

— DAVID KVEDERIS, **PRESIDENT & CEO OF BANKSERV**



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A sampling of former engagements:

Acct1st — Dallas, TX
AccountantsWorld — Hauppauge, NY
ADP — Parsippany, NJ
AICPA — New York, NY
ATX — Rockville, ME
Bankserv — San Francisco, CA
Bill.com — Palo Alto, CA
BNA Software — Washington, DC
BQE Software — Torrance, CA
CCH Tax & Accounting — Riverwoods, IL
CCH Taxwise — Rome, GA
CFS Tax Tools — Simi Valley, CA
Copanion — Andover, MA
CPA ServiceGroup — Fort Worth, TX
CPA2Biz — New York, NY
Drake Software — Franklin, NC
Dun and Bradstreet — Short Hills, NJ
EasyOffice — Norwalk, CT
Fujitsu of America — San Jose, CA
Hewlett-Packard — Palo Alto, CA
Illum Software — Ann Arbor, MI
Intercept Software — Fargo, ND
Intuit — Mountain View, CA
Lacerte (Intuit) — Plano, TX
LexisNexis Time Matters — Raleigh, NC
Microsoft — Redmond, WA
Microsoft Great Plains — Fargo, ND
Mirra, Inc. — San Jose, CA
NetBooks — Rohnert Park, CA
NovaStor — Simi Valley, CA
NSA — Alexandria, VA
OrangeDoor Software — San Bruno, CA
ParishSoft — Ann Arbor, MI
PayCycle — Palo Alto, CA
RealTimeBookkeeping — San Diego, CA
Sage CPASoftware — Pensacola, FL
SageWorks Software — Lawrenceville, GA
SmartVault Corporation — Houston, TX
The Sleeter Group — Pleasanton, CA
Thomson Creative Solutions — Dexter, MI
Thomson GoSystem Tax RS — Carrollton, TX
Thomson PPC — Fort Worth, TX
Thomson Tax & Accounting — New York, NY
Thomson West — Eagan, MN
VerticalLend — Melville, NY

